Our Vision
Kalamazoo County is the most equitable place to live.

Our Mission
Remove barriers through building relationships and connecting resources so people can reach full potential.

A Stronger Foundation
The Kalamazoo Community Foundation team strives to find new and better approaches to our work. The articles in this report tell the story of innovative approaches KZCF used this past year to strengthen our impact in and with community.

These innovations allow us to more effectively pursue equity and ensure every person can take advantage of opportunities to live positive lives.

Give

donate online
kalfound.org/give-now

mail a check
Kalamazoo Community Foundation
402 East Michigan Avenue
Kalamazoo, MI 49007-3888

arrange a planned gift
There are many ways for you to plan now for a gift later. Get in touch with our Donor Relations team at donorrelations@kalfound.org or 269.381.4416 to learn more.

Support

what we fund
We provide grant support to 501(c)(3) nonprofit organizations for work that aligns with our community investment priorities and will benefit residents of Kalamazoo County.

We also provide scholarships for education beyond high school for Kalamazoo-area students.

learn more
kalfound.org/grants

Connect

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KZCF committee and team members are listed on the inside back cover.
As this annual report goes to press and we continue navigating new challenges, we hope this review of our 2019 work will be uplifting and proof of how one organization, working in concert with hundreds of nonprofit partners and community members, can make a difference.

The unique quality of a community foundation, fueled by endowed funds – some going on 95 years – is its permanent status, protected for the long-term, while allowing for flexibility and responsiveness during the short-term. That quality is playing out now, as we do what we do best, collaborating with nonprofit partners and donors throughout Kalamazoo County to remove barriers as we strive to make this the most equitable place to live.

The theme of this report, **A Stronger Foundation**, was in the works months before COVID-19, but it certainly applies to the work at hand. Our innovations and growth during 2019 have served us well since March when we activated our Community Urgent Relief Fund (CURF) in conjunction with United Way of the Battle Creek and Kalamazoo Region’s Disaster Relief Fund. The work of this joint effort is informed by the Kalamazoo County Response Consortium, coordinated by Gryphon Place. As in previous times of crisis, our community speaks and acts with one voice. Our local nonprofit sector is collaborating, problem-solving and collectively identifying emerging needs on a daily basis.

As of press-time, our CURF has distributed 30 grants totaling more than $1.2 million to nonprofits in Kalamazoo County addressing the needs of our community’s most vulnerable. We thank our donors who have contributed more than $1 million since March and our friends and community partners helping with immediate relief including access to food, childcare, shelter, especially for healthcare workers and first-responders.

In these pages, you will read how our commitment to best practices and continuous improvement is making a difference in our daily work.

Also during the past year, by prioritizing equity and education, we have worked on strengthening the community by connecting resources, rallying the collective power of both individuals and organizations to end inequity.

We were thrilled to add two new trustees to our board this past year: **Von Washington, Jr.** and **Sydney Parfet**. And just as the KZCF staff continue their DEI journey, so do our board of trustees.

Times of crisis brings out the best in people and organizations. Now is a time for philanthropy to rise to the occasion and your community foundation is energized and focused to do its very best work in this community response. So, here’s our report to you, our donors, friends and nonprofit partners, looking back and learning from 2019 as we get through 2020 while planning for the future.

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**CARRIE PICKETT-ERWAY**  
PRESIDENT/CEO

**THE HONORABLE CAROLYN WILLIAMS**  
CHAIR, BOARD OF TRUSTEES

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*Give to the Community Urgent Relief Fund using the enclosed envelope or visit kalfound.org.*
Kalamazoo Community Foundation’s Community Investment team is making a shift toward centering trust and authentic relationships in grantmaking. Through conversations with nonprofit partners, the team recognized a common need for increased opportunities to grow capacity for diversity, equity and inclusion (DEI) work.

“Organizations were saying they wanted to deepen their understanding around DEI, but they didn’t always have the professional development dollars to be able to prioritize it for their staff or board members,” said KZCF Community Investment Officer Elena Mireles-Hill (now Director of DEI). “We were getting a lot of individual grant requests to fund trainings and we thought it would be easier for us to just sponsor the trainings so all they have to do is sign up – not spend time writing grants for trainings.”

Although KZCF did offer a few DEI trainings to nonprofits in 2018, the team developed a deeper approach in 2019. In spring 2019, the Community Investment team worked with several local partners to launch the 2019 Equity Series, monthly DEI trainings and workshops offered at no cost for KZCF grantees. Subject matter included ability, anti-racism, immigration, gender identity, LGBTQ identity and thinking about equity work when it comes to servicing clientele with multiple marginalized identities.

“Our grantees serve and support people who have been marginalized by society – children, seniors, people with disabilities, people of color and others. But the reality is a majority of organizations aren’t necessarily led by these same groups,” Mireles-Hill said. “One way to bridge that disconnect, was to provide training to grow their staff’s DEI capacity as a way of increasing impact and reducing possible harms service recipients could experience.”

These harms can include further isolating community members by offering programs and services that are not culturally appropriate or accessible.

“Organizations were saying they wanted to deepen their understanding around DEI, but they didn’t always have the professional development dollars to be able to prioritize it for their staff or board members.”

Elena Mireles-Hill, Community Investment Officer Kalamazoo Community Foundation

Trainings included Intro to Gender-Nonconforming Community Members facilitated by Sojn Boothroyd; Understanding Identity, Power and Oppression with Mia Henry; and Ableism 101 with Disability Network Southwest Michigan. Attendance was maxed at the anti-racism trainings as well as the immigration trainings. The LGBTQ and gender identity trainings were also well-attended.
Nonprofit response

Since the series launched, the KZCF Community Investment team has noticed a difference in how nonprofits are communicating about their work, outlining strategies around DEI in their organizations and making adaptations to better serve the diversity of the community. Participants’ responses to workshops have been positive.

“Mia Henry did an impressive job presenting very challenging and often uncomfortable material to a broad range of attendees in a way that also invited people to challenge their own assumptions and biases,” responded one nonprofit partner in an anonymous survey following the Identity, Power and Oppression training.

Participants also left the training with tools to make changes in their work. “I’d like to take more time to know the identities, experiences and needs of the customers we serve from their perspective,” another nonprofit survey response said.

Tools for change

To increase access to leadership opportunities, the Community Investment team also prioritized funding for direct coaching and capacity building support for nonprofit leaders of color from local grassroots organizations. This, in addition to the Equity Series, are among the strategies the Community Investment team explored in 2019 to provide resources and support beyond grantmaking.

“We understand that money alone won’t get us to the change we hope to see in Kalamazoo County.”

Sandy Barry-Loken, Senior Community Investment Officer, Kalamazoo Community Foundation

Grantees gather for the Ableism training facilitated by Disability Network Southwest Michigan. This workshop examined the belief system that tells us it is better to be non-disabled than it is to be disabled.
Kalamazoo Community Foundation’s co-investment program is customized for donor advisors who are interested in digging deeper into their philanthropy journey, while at the same time helping the KZCF stretch its grantmaking dollars.

Donor advisors commit to investing a specific dollar amount with KZCF during the calendar year. KZCF Donor Relations team then presents funding opportunities to donor advisors participating in the program during one or both of KZCF’s grantmaking cycles.

The funding opportunities offered align with KZCF’s priorities and the donor advisors’ philanthropic interests. If interested in funding opportunities through co-investment, donors can suggest grants from their fund.

“This experience gives our donors an opportunity to learn more about the innovative and impactful work of local nonprofits addressing an area of need that is important to them,” said Joanna Donnelly Dales, vice president of Donor Relations.

Finding the right match

The VanAllens are donors who were approached last Spring about an opportunity to support local nonprofits through co-investing.

“We met with members of the Donor Relations and Community Investment teams and learned about the organizations in more detail. We selected one with high financial need, doing great work in an area important to us,” VanAllen said.

That co-investment grant from the VanAllens benefited Healthy House, a rehabilitation center for women experiencing issues with substance misuse.

“This experience gives our donors an opportunity to learn more about the innovative and impactful work of local nonprofits addressing an area of need that is important to them.”

Joanna Donnelly Dales, Vice President of Donor Relations
Kalamazoo Community Foundation

Impact of co-investing

“I remember walking into the Gateway Treatment Center on March 26, 1996, after 20 years of active addiction. I was court-ordered to go to treatment and my daughter had become a ward of the state. On March 26, 2019, I had 23 years of being clean from all drugs.”

This is the story of a staff member of Healthy House for Women, established in 2015. The Healthy House staff understands what it takes to turn a life around.
“I can totally relate to the cultural, racial, economic and gender barriers that the women we serve have to address and overcome in order to become responsible productive members of our community,” the staff member reflected.

The Healthy House team shares their experiences of addiction, healing and growth with women who are at risk of homelessness due to unaddressed issues, such as substance use disorder, mental health diagnosis, unemployment, and lack of educational and community supports.

Healthy House began by drawing on community-based values, traditions, customs, and working with knowledgeable community members to plan, implement, and evaluate prevention activities.

Their program promotes academic, occupational, emotional and spiritual competence, resulting in individual progress toward personal fulfillment and positive contribution to the community.

Their mission is to provide a safe, sober, structured residential environment for women in recovery from co-occurring illness.

Healthy House accommodates eight women at a time, ages 18 to 60, in its fully-furnished house, including bedding, sheets and towels. Some of the residents have temporarily lost custody of their minor children, so Healthy House collaborates with the appropriate agencies to arrange supervised visitations.

“Expertise from our grantmaking team allows our donors to gain a deeper understanding of our community and local organizations.”

One of many
This is just one of many local organizations that received a boost in support through KZCF’s Co-investment option.

“Expertise from our grantmaking team allows our donors to gain a deeper understanding of our community and local organizations,” Dales says. “We enjoy providing our donors with experiences and opportunities to learn more about what’s happening in the community.”

Interested in learning more about co-investing and its community impact? Connect with our Donor Relations team by calling 269.384.3381.
In 2019, the Kalamazoo Community Foundation (KZCF) Scholarship team explored how to remove barriers for local high school students looking to further their education and reach full potential. The team took on the challenge of re-evaluating the requirements and application scoring measures for one of our biggest scholarships – The Clarence L. Remynse Scholarship.

“The goal of our program is to help students – especially students with fewer resources – make their college goals a reality,” said Laura Galaviz, scholarship officer at KZCF. “Unfortunately, a lot of our evaluation tools were not necessarily set up to identify students who showed the drive, ability and potential for success in higher ed, but more so to reward students who had risen to the top of their classes in high school.”

Remynse Scholarship recipients can receive a $7,500 maximum award that can be renewed for up to three years, making it the largest scholarship offered at KZCF.

“The Remynse is our largest scholarship both in number of recipients and award amount. It seemed to make sense that starting with that scholarship would help us see how much of an impact we could make by expanding our thinking around excellence,” Galaviz said.

“Don’t lower the bar, lower the barriers”
The team’s new approach was inspired by Nadira Foley’s book, “A Radical Plan to Combat Inequality in College Admissions.” She challenges institutions to use resources to cultivate the best students as opposed to simply finding them. Through research, school visits and interviews with teachers and counselors, the team identified common barriers in traditional scholarship requirements: transportation and limited home resources, school curriculum and activity offerings.

Lack of access to transportation limits participation in extracurricular activities, volunteer opportunities, SAT prep or tutoring. Limited financial resources blocks students from participating in these activities, especially if they act as a caregiver for a younger sibling or help support their family with a part-time job. Barriers are also created when schools are not able to offer a variety of extracurricular activities and Advanced Placement classes.

“When we have a very traditional view of what excellence is, we inadvertently reinforce and even widen the achievement and wealth gap.”

Laura Galaviz, Scholarship Officer
Kalamazoo Community Foundation

With these barriers in mind, the Remynse application scoring measures were revised to include criteria such as perseverance, growth, initiative, character and impact. Now, scoring does not factor in standardized testing. Extracurricular activity scoring takes into consideration work experience during the academic year, student impact and demonstrated performance improvement. The essay prompt also reflects this newly adopted criteria.
Galaviz emphasized the changes aren’t meant to exclude students who have traditionally done well in Remynse scoring. The goal is to create a more inclusive understanding of what it means to excel as a student. “When we have a very traditional view of what excellence is, we inadvertently reinforce and even widen the achievement and wealth gap,” Galaviz said.

“I wanted to look at scholarships more holistically, not solely as a reward for a great GPA and a lot of activities – which are admirable achievements, but not the only determiner of post-high school success,” Galaviz said. “This was a way of increasing equity by supporting students who could clearly succeed in college, but perhaps encountered barriers in their K-12 journey.”

Impact of equity

The results were encouraging, with an improved diversity of applicants. Of the top 35 applicants, 37% identified as people of color, up from 19% in 2018.

Aside from scoring, the team also re-evaluated how they were informing students about scholarship opportunities. A change in outreach strategy led to increased applicant representation from previously underrepresented school districts in the county. And after 10 years of the scholarship only being open to graduating high school seniors, Remynse was extended to first-year college students in 2019. Without that change, local college students like Jeztrelle Abella would have been excluded.

Reimagining excellence

Jeztrelle Abella, a first-year Pre-Law student at Kalamazoo College, is one of this year’s Remynse recipients and among the top 10 highest scoring applicants.

She knew the Remynse scholarship was an opportunity to help her reach her dreams of pursuing law or nonprofit work. Abella, who was born in the Philippines and grew up in Kalamazoo, wants to use her multi-cultural background to help others and improve representation in the field of law.

“You don’t see many people of color in law,” said Abella. “And I think being bilingual will give me an opportunity to help more people.”

She is proud of everything she was able to achieve as a high school student, including graduating summa cum laude from Comstock High School. She even held a full-time job during the school year, while friends and family helped her along the way.

“My friends definitely played a role in my success. I was surrounded by like-minded people who encouraged me and helped me to always do my best,” Abella said. “And my mom of course. She was my biggest supporter.”

Because Abella’s mother did not attend American schools like she did, there were some challenges when it came to navigating the education system. “My mom, just being present and making sure I had what I needed, was a big support,” Abella said.

Remynse Scholarship recipient Jeztrelle Abella is a graduate of Comstock High School. She’s currently in her first year at Kalamazoo College studying Pre-Law.
In just three short years, Truth, Racial Healing & Transformation (TRHT) Kalamazoo has grown from a new initiative in Kalamazoo to a community-led movement with over 130 local partners supporting the work.

In just the last two years, five teams have formed to develop programming that examines and works to heal the historical and present-day impact of racism in core areas society: Law, Economy, and Separation (segregation in housing and education), Narrative Change, and Racial Healing and Relationship Building.

“We took on the challenge of designing what TRHT specifically needed to look like for Kalamazoo and bringing that vision to life,” said Sholanna Lewis, director of TRHT Kalamazoo. “We’ve made great strides in such a short time and it’s only through the collaboration and dedication of our community and partners that this is possible.”

The community and infrastructure surrounding TRHT are not the only things that have grown. TRHT continues to grow critical funding to sustain its work in the community for years to come. With funding from the Stryker Johnston Foundation, in addition to support from the W.K. Kellogg Foundation and Kalamazoo Community Foundation (KZCF), the TRHT Kalamazoo Endowment Fund was established in 2019 with a $1 million investment.

The TRHT Endowment fund is held at KZCF, which currently serves as the host for TRHT in Kalamazoo. Funds from the endowment will support long-term and multi-faceted efforts to address racial inequity, discrimination, racial bias and institutional and systemic racism while also supporting racial healing work in Kalamazoo County.

Here’s a snapshot of some of the work TRHT has led in the last year:

**Cultural awareness training for police cadets**

In February 2019, the TRHT Law Design Team, led by retired Captain Stacey Randolph Ledbetter, launched a training program to train police cadets to heal mistrust and strained relationships between law enforcement and communities of color. The training is the first of its kind for police cadets in Michigan. Since the first training, the team has held two additional local trainings with over 50 cadets and 150 community members.

“These unique experiences and trainings bring together police cadets and a diverse group of local community members to have real conversations about personal stories, to learn history about the U.S. not often taught, and to build positive relationships.
in the process,” said Ledbetter. “The results are reaffirming individual humanity, and increasing consciousness, cultural awareness, respect and empathy for everyone in attendance.”

**Coalition for Inclusive Communities**

KZCF is one of five community foundations in the nation recently selected for the Coalition for Inclusive Communities (CIC), a project of Boston-based CFLeads (Community Foundations Leading Change). CIC will work to advance equity in the workplace and build community cohesion. KZCF and other participating foundations will develop local employer networks to identify and promote practices that improve workplace equity.

The TRHT Kalamazoo Economy Design Team is implementing this work in Kalamazoo County. Goals include developing a network of employers committed to promoting workplace equity; and creating a targeted effort to support and provide access and resources to people of color.

**Urban Institute Housing Challenge**

At the Urban Institute’s 2019 national housing conference, TRHT Separation Design Team and a group of local partners won the Housing Design Challenge. Teams were challenged to design an intervention plan that could increase well-being, stability, or racial equity with a particular resident’s experience in mind. Out of 100 participants, the Kalamazoo partnership was one of three plans selected to receive technical and financial support from the Urban Institute to bring the idea to life.

The team’s plan addresses housing instability among residents of color while tackling high vacancy in low-income neighborhoods in Kalamazoo County. Together, the partners are drafting a long-view approach to combine current and future programs together into a multiyear path for improved housing access and housing stock.

“The endowment fund provides sustainability, and this is only the beginning,” said Carrie Pickett-Erway, president/CEO of KZCF. “We know systemic racism can only be addressed effectively through long-term efforts. We will continue to seek monetary gifts as well as gifts of time and talent to support this critical work for generations to come.”

“Starting an endowment fund will firmly plant the seeds of transformation in Kalamazoo now and into the future,” said Andrew Chaponda, TRHT Kalamazoo Separation Design Team Lead. “Our work, like removing impediments to equitable housing in Kalamazoo, will take years to address fully. We couldn’t be more excited to keep this work going.”

Building the TRHT Endowment Fund was a team effort. KZCF staff members and the board of trustees personally contributed to seed the fund.

Visit TRHTKzoo.org to learn more.
In 2019, the Kalamazoo Community Foundation (KZCF) established a Socially Responsible Investment (SRI) option in order to increase alignment with our core values and equity priority. Susan Springgate, vice president for Finance and Administration, and Kelly Campbell, finance manager at KZCF, worked with Greenleaf Trust to create this new option.

The goal of socially responsible investing is to achieve strong risk adjusted returns in investments that have a positive impact on the world. The SRI pool had a successful first year with a return of 22.1%, slightly ahead of the return for the Foundation’s endowed funds of 19.2%.

KZCF’s SRI pool utilizes funds managed by firms that incorporate environment, social and governance (ESG) screens, considerations and restrictions in the management of their funds. Thus, they identify companies to actively remove or include based on specific ESG factors. ESG factors include the following issues:

- Environment (climate, pollution)
- Community development
- Diversity
- Human rights including child labor
- Labor relations
- Corporate governance
- Products such as alcohol, weapons, gambling, tobacco

**Agency endowed funds**

Interfaith Strategy for Advocacy & Action in the Community (ISAAC), a local nonprofit, was the first agency to recommend its Endowment Fund at KZCF be invested in the Socially Responsible Investment option. ISAAC is a faith-based community organizing group made up of congregations and organizations that pursue solutions to issues of injustice in Kalamazoo County.

“Choosing [Socially Responsible Investment] means we’re not supporting various companies that don’t align with our values, and it’s a wonderful thing. There is no moral conflict of interest.”

Tobi Hanna-Davies
VP of Communications, ISAAC

The organization made the recommendation to align the fund’s investments with ISAAC’s values of equity and community. According to ISAAC, its commitment to Socially Responsible Investment is a new way it is working toward its mission: cultivating the Beloved Community.

“Choosing SRI means we’re not supporting various companies that don’t align with our values, and it’s a wonderful thing,” said Tobi Hanna-Davies, vice president of Communications at ISAAC.

“There is no moral conflict of interest.”
Benefits of SRI

Recent trends show an increased interest in SRI, and the demand is making it become a more viable investment option. According to Lucas Mansberger, investment strategist at Greenleaf Trust in Kalamazoo, average investors as well as giant institutional investors want more SRI options which pushes change in awareness of investment risks from ESG issues.

“In the past, it was hard to find ways to invest that reflected your concerns if you were socially aware,” Mansberger said. “The number of SRI funds and strategies have grown by the hundreds.”

In the past, investors may have had to compromise investment returns if they had an interest in investing responsibly. “Historically, if you wanted your investment to be impactful that meant taking a lower type of return,” Mansberger said.

“Now the best, world-class money managers are doing ESG risk and return research for all of their clients not just for those already interested in SRI. They believe that paying attention to risk and return opportunities related to ESG issues will lead to better returns overall.”

Making the move to SRI

Hanna-Davies agrees. She first inquired about the SRI option in 2017, before it was available at the KZCF. “As soon as the option was ready, we set up a meeting right away with our executive director, president and treasurer and members of the KZCF staff. At that meeting, after getting all our questions answered, we decided right away that we wanted to transfer our endowment to Socially Responsible Investing.”

She shared the move to Socially Responsible Investing inspired new donors to contribute to the ISAAC Endowment Fund at KZCF.

“At the end of 2019, we were about $6,000 short from the $50,000 minimum for a fully endowed fund,” Hanna-Davies said. “We let our donors know how close we were to the goal and reminded them about SRI and we got a flood of donations as a response. We even surpassed our goal.”

If you are a fund representative interested in KZCF’s Socially Responsible Investment option, contact your KZCF Donor Relations Officer or call 269.381.4416.
## Combined statement of financial position

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<tr>
<th>AS OF DECEMBER 31</th>
<th>2018</th>
<th>2019</th>
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## Combined statement of activities

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Kalamazoo Community Foundation’s audited financial statements as of December 31, 2019, are available online at kalfound.org/publications.
Moderate growth performance / endowed funds

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The Moderate Growth Benchmark is a staged index composite benchmark that has the current composition of the Barclays US Aggregate Bond Index (15 percent); Barclays US Treasury 5-10 Yr TR USD (10 percent); DJ US Select REIT index (2.5 percent); MSCI EAFE Small Cap Index (10 percent); MSCI Emerging Markets Value index (10 percent); Russell 1000 Value index (5 percent); Russell 2000 Value index (10 percent); Russell Micro Cap index (5 percent); S&P 500 index (30 percent); and the NCREIF Fund Index ODCE (2.5 percent).

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**Other committees and teams**
More than 150 community members also serve on our scholarship committees, TRHT Design Teams, and the LGBTQ Equality Fund and Love Where You Live Environment Fund committees.